

HOW TO MAKE A Military Deposit

- **Military Deposit:** A military deposit is a payment to the Federal Employees Retirement System (FERS) to allow creditable military service to be used towards retirement eligibility and annuity computation.
- **Deposit:** A deposit is the payment of the retirement deductions, plus interest, that would have been withheld from your pay if you had been covered by the Federal Employees Retirement System (FERS) during a period of employment when retirement deductions were not withheld from your salary.

Definitions

IMPORTANT NOTE

You are only authorized to make one military deposit at a time. You must complete the following steps for each military deposit, one at a time.

For example, if you have two military deposits you must complete the following steps for the first military deposit before proceeding to the second military deposit.

- Please direct any questions to the following individuals.
- Stephanie Hodges
 - Office: 785.274.1187
 - DSN: 720.8187
 - Fax: 785.274.1604
- Robin Lewis
 - Office: 785.274.1206
 - DSN: 720.8206
 - Fax: 785.274.1604
- Bobbi Harvey
 - Office: 785.274.1172
 - DSN: 720.8172
 - Fax: 785.274.1604

HRO personnel

HOW TO MAKE A Military Deposit

Step 1

- A. Complete the *RI 20-97*, Estimated Earnings During Military Service.
- Click [RI 20-97](#) for an electronic RI 20-97 form.
 - An example of how a *RI 20-97* should be filled out is on the next slide.
- B. Mail the completed *RI 20-97* to the appropriate military finance center with a copy of all DD Forms 214.
- Click [here](#) for the mailing addresses.

NOTE: If you have service with more than one branch of the military, you will need to complete a separate RI 20-97 for each and mail to the appropriate military finance office.

EXAMPLE OF RI 20-97

All blocks outlined in RED are required to be filled out.

United States
Office of Personnel Management
Retirement Operations Center
Boyers, Pennsylvania 16017

Estimated Earnings During Military Service

Instructions: Use a separate RI 20-97 for each branch of service. Attach DD 214 or the equivalent and any available records of pay or promotions. The pay center cannot provide estimated earnings without verification of service. The requester must complete blocks 1 through 10 and block 19. Visit the Defense Finance and Accounting Service website for additional information: www.dfas.mil.



1. Name (Last, first, middle) DOE, JOHN ALLEN	
2. Other names used	
3. Social Security Number 112-11-1122	4. Date of birth (mm/dd/yyyy) 01/01/1967
5. All military service numbers	
6. Branch of service ARMY	

The uniformed services must provide Federal employees' estimated basic pay for military service they performed after December 31, 1956. This is needed to make a deposit to the Civil Service Retirement and Disability Fund for retirement credit. Please provide the estimated basic pay earned by the person named above.

7. Signature of requester	8. Relationship to person named <input type="checkbox"/> Person named is requester <input type="checkbox"/> Survivor <input type="checkbox"/> Other (specify):	9. Date
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10. Active military service after December 31, 1956 (Dates indicated below must be based on DD 214 or equivalent certification.)	11. Authorized Official of Retired Pay Center completes blocks 11 through 18. Estimated Earnings (Base Pay) Do not provide estimated earnings for any period of service prior to January 1, 1957.
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From (mm/dd/yyyy)	To (mm/dd/yyyy)	From (mm/dd/yyyy)	To (mm/dd/yyyy)	Rate of Basic Pay	Earnings	Type of Discharge
02/10/2010	01/17/2011					
10/03/1994	10/02/1997					

List all dates of active duty military service (Title 10). The dates will match with the DD 214s.

NOTE: If you want to make multiple deposits please ensure you list all active duty military service (Title 10). By doing this you will only need to complete step 1 once.

List your name and your home mailing address.

12. If period of service began before and ended after December 31, 1956, enter date service actually began. (mm/dd/yyyy)	13. L <input type="checkbox"/> Inclusive Dates (mm/dd/yyyy) (mm/dd/yyyy) (mm/dd/yyyy) (mm/dd/yyyy)
14. List your name and your home mailing address.	16. Telephone number (including area code) ()
17. Typed name of authorized official	18. Title of authorized official

19. Requester's name and address (Return this completed form to address below)

JOHN A. DOE
123 SAMPLE ST
SAMPLETOWN, KS 66611

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HOW TO MAKE A Military Deposit

Step 2

- A. Once you receive the completed *RI 20-97* back from the military finance center, complete the *SF 3108*, Application to Make Service Credit Payment (FERS).
- Click [SF 3108](#) for an electronic SF 3108 form (pages 1,5)
 - An example of how a SF 3108 should be filled out on the next slide.
 - **NOTE**: Keep a copy of the completed RI 20-97. It will be needed to complete the military deposit process.
- B. Mail or fax the *SF 3108* with the completed RI 20-97 and active duty military service (Title 10) DD 214(s) to:

Mail: **Army Benefits Center-Civilian (ABC-C)**
303 Marshall Avenue
Ft. Riley, KS 66442-5004

Fax: **785-240-6153**

EXAMPLE OF SF 3108

- All blocks outlined in **RED** are required to be filled out.
- **NOTES:** (Please call with questions if unsure)
 - Block 4: Home Mailing address
 - Block 5: Will vary depending upon which branch the employee is presently employed to.
 - Army: JFHQ-KSARNG, NGB, Adjutant Generals Dept
 - Air: JFHQ-KSANG, NGB, Adjutant Generals Dept
 - Block 7: Always Topeka, KS
 - Block 9a: Check "Service credit payment"
 - Block 9: Check "No"
 - Block 10: Check "Military Service"
 - Block 11: Check "Yes"



Application to Make Service Credit Payment Federal Employees Retirement System

Form Approved
OMB No. 3206-0134

To avoid a delay in processing your claim:
1. Read the attached information carefully.
2. Type or print in ink.
3. Complete Part A in full. If you are currently a Federal employee,
have your employing agency complete Part B.

Part A. To be Completed by the Applicant

1. Name (Last, first, middle) DOE, JOHN ALLEN		2. List other names you have used		3. Birthdate (mm/dd/yyyy) 01/01/1967				
4. Address (Number and street) 123 SAMPLE ST (City, state and ZIP Code) SAMPLETOWN, KS 66611		5. Department or agency in which presently or last employed, including bureau, branch, or division JFHQ-KSANG, NGB, ADJUTANT GENERALS DEPT		6. Social Security Number 112-11-1122				
9. Have you previously filed any application under the Federal Employees Retirement System (FERS) or the Civil Service Retirement System (CSRS)? <input type="checkbox"/> Yes, complete items 9a and 9b <input checked="" type="checkbox"/> No		7. Location of employment (city and state) TOPEKA		8. Title of position Heavy Mobile Mechanic				
10. I am applying to make a service credit payment for: <input type="checkbox"/> Civilian Service (Complete item 10) <input checked="" type="checkbox"/> Military Service (Go to item 11)		9a. Type of application <input checked="" type="checkbox"/> Service credit payment <input type="checkbox"/> Refund <input type="checkbox"/> Return of excess deductions <input type="checkbox"/> Retirement		9b. Claim number(s) (if available)				
List below in chronological order all periods of Federal civilian service. Be sure all your service is listed so that the Office of Personnel Management (OPM) can bill you for the correct amount.								
Department or Agency (including bureau, branch or division where employed)	Location of Employment (city and state)	Title of Position	Periods of Service		Check whether deductions were not withheld, withheld and refunded, or withheld and remain to your credit			Put a check mark (✓) in the boxes below, next to the periods of service you want to pay for. (If you do not want to pay for a specific period of service, leave the box blank.)
			Beginning Date (mm/dd/yyyy)	Ending Date (mm/dd/yyyy)	Not Withheld	Withheld and Refunded	Withheld and Not Refunded	
11. Are deductions for the Federal Employees Retirement System now being withheld from your salary? <input checked="" type="checkbox"/> Yes (Go to item 13) <input type="checkbox"/> No (Go to item 12)			12. Give the date of separation from your last position under the Federal Employees Retirement System Date of separation (mm/dd/yyyy) 01/24/2012					
13. Signature of applicant 			14. Telephone number (including area code) where you can be reached during the day (785) 125-1111					
			15. Date (mm/dd/yyyy) 01/24/2012					

EXAMPLE OF SF 3108

All blocks outlined in **RED** are required to be filled out.

Application To Pay Military Deposit For Military Service Performed After December 31, 1956

You must be currently employed and covered under FERS to make the military deposit. You must complete the deposit in full before the separation on which your retirement benefit will be based.

Employee's Name	Date of Birth (mm/dd/yyyy)	Social Security Number

1. Information About Employee's Military Service

To Be Completed By Employee			Agency Use Only (To Be Completed By Agency HR Office)				
Branch of Military	Period of Service		Retirement System Rules That Apply to the Service (Check appropriate box)		Does Alternative Deposit Calculation Under USERRA Apply? (Check appropriate box)		Interest Accrual Date (IAD) (mm/dd/yyyy)
	Beginning Date (mm/dd/yyyy)	Ending Date (mm/dd/yyyy)	CSRS	FERS	Yes	No	
			Certification: The information entered above is based on official records of this agency and is correct.				
			Agency Official Signature				Date (mm/dd/yyyy)

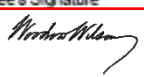
2. Employee's Acknowledgment of Understanding of Military Service Credit and Deposit Rules

I am currently employed in a position where deductions for the Federal Employees Retirement System (FERS) are being deducted from my salary, and I wish to pay the deposit necessary to obtain credit for my military service after 1956. I understand that I must pay the entire deposit to my employing agency before separation for retirement. I further understand that the military deposit cannot be deemed paid at retirement if I am eligible for and elect an alternative annuity. If I do elect the alternative annuity upon retirement, any completed military deposits made to the Fund will be refunded to me along with any other retirement contributions or payments I made to the Fund. Once I complete the deposit in full, I understand that it can only be refunded to me if I become eligible for a refund of my retirement contributions or retire without waiving my military retired pay (if any).

I understand that for any given full period of military service that I have performed, if I do not complete the deposit for that full period of military service, any payments I made that were applied to that full period of military service will be refunded to me when I retire or when I become eligible for a refund of my retirement contributions. I also understand each of the following service credit rules and how they apply to any given full period of military service that I have performed for which I have not completed the military deposit:

- For each period of military service performed after 1956 that is subject to FERS rules, the post-1956 military service will not be used to compute or establish title to a FERS annuity if I do not complete the deposit before I separate for retirement.
- For each period of military service performed after 1956 that is subject to Civil Service Retirement System (CSRS) rules in a CSRS component of my FERS annuity:
 - If the first time I worked in a position where CSRS deductions were withheld from my salary was on or after October 1, 1982, the post-1956 military service will not be used to compute or establish title to a FERS annuity if I do not complete the deposit before I separate for retirement.
 - If the first time I worked in a position where CSRS deductions were withheld from my salary was before October 1, 1982, the post-1956 military service will not be used to compute my annuity at age 62 (or when I retire, if I retire after age 62), if I am eligible for Social Security benefits at that time.

Finally, I understand that payment of this deposit will not make my military service creditable if it is otherwise not creditable under FERS or CSRS. I realize that the Office of Personnel Management (OPM) is solely responsible for adjudicating and administering civil service retirement benefits. I understand that OPM will determine if my military service can be credited in my FERS retirement when I apply for my retirement benefits.

Employee's Signature	Telephone number where you can be reached during the day	E-mail address	Date (mm/dd/yyyy)
	()		

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Standard Form 3108A
February 2012

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Step 3

A. ABC-C will receive the SF 3108, RI 20-97, and the supporting DD Form 214s and:

- Review the documents for accuracy.
- Calculate an estimate of the amount of military deposit.
- Send the estimate to DFAS.

B. You will receive a packet of documents from ABC-C.

- **NOTE: Keep the packet of documents.** They will be needed to complete the military deposit process.
- The packet will include the amount of the military deposit, listed on Military Service Deposit Report.

- **NOTE:** No further action is required for Step 3 please proceed to Step 4.

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Step 4

- A. You may receive a letter of confirmation from DFAS and if and when you do choose one of three payment options and follow its instructions.

OR

- B. If you do not receive a letter from DFAS, you may choose one of the payment options and follow its instructions, when the amount of the military deposit shows "OWED" in Block 20 of your Leave and Earnings Statement (LES).

- **NOTE**: If you do not receive a confirmation from DFAS or see the amount of the military deposit on your LES within 3 months please contact the HRO personnel.
- **NOTE**: Please review the payment options and its instructions on the following slides.

Payroll Deductions

- A. Complete Military Deposit Request.
- **To receive a Military Deposit Request please contact HRO personnel.**
 - An example of how a Military Deposit Request should be filled out on the slide labeled "Example of Military Deposit Request".
- B. Fax Military Deposit Request and a copy of any document you have received from ABC-C and the completed Military Deposit Request:
- (866) 401-5849**
Attn: Military Deposit Section
- Documents you received from ABC-C will be listed at the bottom of the Military Deposit Request.
- C. Ensure your **social security number** is on each document faxed.

NOTE: This is any amount you choose but it must be a minimum of \$25.00 per pay period.

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Step 5

EXAMPLE OF Military Deposit Request

All blocks outlined in **RED** are required to be filled out.

NOTES:

- Block 4: If choosing Payroll deductions only then fill in the remaining portion of block 4.
- Attachments: Documents that will be necessary to fax or mail with the Military Deposit Request.

MILITARY DEPOSIT REQUEST

To avoid a delay in processing:

1. Read and complete the information carefully.
2. Type or print in ink.

1. Name (Last, first, middle)

DOE, JOHN ALLEN

2. Social Security Number

112-11-1122

3. Mailing Address

123 SAMPLE ST

Address (Number and street)

SAMPLETOWN, KS 66611

(City, state and ZIP code)

4. Method of Payment: I will be submitting payment by (Select one)

☐

Lump-Sum

☐

Partial Payment

☒

Payroll Deductions (If selected complete the additional information below.)

\$ 50.00 Amount of deduction per pay period

1/24/2012 Date to start the deduction
(mm/dd/yyyy)

5. Signature of requestor

John A. Doe

Attachments

- (a) Military Deposit Request
- (b) RI-2097 (Estimated Earnings During Military Service)
- (c) Military Service Deposit Report
- (d) DD Form(s) 214
- (e) SF 2803 or SF 3108
- (f) SF 50s Leave Without Pay and Return to Duty (**ONLY** for those members buying back contingency operations time.)

Fax the Military Deposit Request and the aforementioned attachments to:

(866) 401-5849

Attention: Military Deposit Section

Lump-sum Payment

- A. Complete Military Deposit Request.
- To receive a Military Deposit Request please contact HRO personnel.
 - An example of how a Military Deposit Request should be filled out on the slide labeled "Example of Military Deposit Request".
- B. Make your check to: "**Catch 62 Military Deposit**".
- The check **MUST** have "**Military Deposit**" and your "**Social Security Number**" written on it.
- C. Please staple your check to a copy of any document you have received from ABC-C and the completed Military Deposit Request. Mail to:
- DFAS-Cleveland**
ATTN: 22 Military Deposits
PO Box 99559
Cleveland, OH 44199-8019
- Documents you received from ABC-C will be listed at the bottom of the Military Deposit Request.
- D. Ensure your **social security number** is on each document faxed.

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Step 5

Partial Payment

- A. Complete Military Deposit Request.
- To receive a Military Deposit Request please contact HRO personnel.
 - An example of how a Military Deposit Request should be filled out on the slide labeled "Example of Military Deposit Request".
- B. Make your check to: **"Catch 62 Military Deposit"**.
- The check **MUST** have **"Military Deposit"** and your **"Social Security Number"** written on it.
- C. Please staple your check to a copy of any documents you have received from ABC-C and the completed Military Deposit Request. Mail to:

DFAS-Cleveland
ATTN: 22 Military Deposits
PO Box 99559
Cleveland, OH 44199-8019

- Documents you received from ABC-C will be listed at the bottom of the Military Deposit Request.
- D. Ensure your **social security number** is on each document faxed.

NOTE: This is any amount you choose but it must be a minimum of \$25.00 per pay period.

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Step 5

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Step 6

- A. When Block 20 of your LES shows an "OWED" balance of 0.00 contact HRO personnel and inform them of your military deposit payment completion.
 - **KEEP** a copy of that LES as a record of payment.
- B. HRO will request an OPM 1514, Military Deposit Worksheet, from DFAS that will act as proof of payment.
 - The OPM 1514 will be sent to you.
- C. Once you receive the OPM 1514 and its supporting documents you **MUST** send a copy (fax/email) to HRO so that you can be given proper credit.
 - **NOTE**: If you do not send a copy of the OPM 1514 you will not receive credit!
 - **NOTE**: If you do not receive a receipt from DFAS within 6 months or have questions please contact the HRO personnel.